ELECTrack User Guide
Version 4.0

Contents

Part 1. Introduction

1.1   What ELECTrack Is

ELECTrack is primarily a tool for filing Campaign Finance Report data. Accordingly ELECTrack provides the user with the ability to enter contributions, transfers, loans, outstanding bills, and expenditures. ELECTrack also assists the user in formatting the report and creating the necessary totals and summary information. ELECTrack contains a number of features that are designed to help users comply with Maryland Campaign Finance laws and effectively utilize their campaign finance data.

1.2   What ELECTrack Is Not

ELECTrack is not a comprehensive campaign management system. ELECTrack does not interface with other programs, such as check writing or accounting software. While ELECTrack is capable of supporting all campaigns finance entities, the majority of large campaigns utilize the software and services provided by private vendors. A listing of private vendors who support Maryland campaign finance entities can be obtained on the State Board of Elections website www.elections.state.md.us.

1.3   Using This Manual

This User Manual is intended to help give an overview of the software and a description of the capabilities. For more in-depth information, please also consult the ELECTrack on-screen Help feature.

Part 2. Getting Started

2.1   Installation

The software is delivered on a CD that should automatically start when placed in the computer. If it does not, you need to go to the "Start" menu, select "Run" and then enter D:\Setup (or replace the "D" with the letter representing your CD ROM drive). Instructions and information about the install will come up on the screen. The installation process may prompt you to restart the computer more than once. This is normal for older machines without the latest system software from Microsoft. You may use the Custom setting to put the software somewhere other than the default directory, but the standard is to place it on the C drive in "Program Files" under "EFS".

If you already have an older version of ELECTrack installed on your computer, you do not need to uninstall it. Simply install Version 4.0. Your data will not be altered or lost. However, It is recommended that you make a back-up of your database before installing the new version.

2.2   Terminology

Throughout this User Manual, the following words and phrases will be used:

- Delete button – Located on the Tool Bar, this button is used for deleting a selected record.
- ELECTrack Main Window – The first window that appears when ELECTrack is started. The main window contains 9 buttons that are useful for navigating through the ELECTrack.
- Execute button – Located on the Tool Bar, this button is used for starting certain functions such as export or backup.
- Exit button – Located on the Tool Bar, this button is used for closing the active window.
- Help button – Located on the Tool Bar, this button is used for accessing help information specific to the active window.
- Magnifying Glass – This button is used for initiating a search.
- Menu Bar – The menu bar is located at the top of the ELECTrack Main Window and contains the following options: File; Account Entry; Report Entry; Print Reports; Export; Maintenance; Tools; Window; and Help.
- Print button – Located on the Tool Bar, this button is used for printing the selected item.
- Print Preview button – Located on the Tool Bar, this button is used for previewing the selected item.
- Save button – Located on the Tool Bar, this button is used for saving the current record.
- Tool Bar – Located on the active window, the tool bar contains buttons necessary for instigating certain functions (i.e. save, delete, or exit).

2.3   Account Initialization
From the ELECTrack Main Window click on the "Set Up Your Account" button. You will then need to enter your account number, account name, account type, account year, and activation code in the appropriate fields. You will also need to indicate whether your account is a continuing or non-continuing account.

When you received your ELECTrack software you also received an Account Initialization memo which contains all of the information necessary to fill out the account initialization window.

It is important that this information be entered correctly. Once you save the information and begin to enter report data, you will not be able to change the account number. If this data is entered incorrectly your reports cannot be imported into the State database and therefore cannot be accepted or considered filed by the State Board.

Part 3. Entering Your Report Data
3.1   Report Type
Whenever you want to enter campaign finance data (contributions, loans, and expenditures) click on the "Create or Edit a Report" button from the ELECTrack Main Window. First you must indicate which report you want to create or work on. To do this, complete the following steps:
   a.   In the Report Year field, type or select the year in which the report is due.
   b.   Click on the magnifying glass next to the report type field and select the appropriate report type.
   c.   If you are creating a new report you will be asked, "Did you file an affidavit or cancellation?". If you answer no, the default beginning transaction date will be displayed. If you answer yes, no beginning transaction date will be displayed and you will have to enter it.
   d.   If you are creating a new report you will need to click Save on the tool bar before continuing.

3.2   Entering Receipts
To enter a receipt, including a contribution, transfer, or in-kind contribution do the following:
   a.   Click on the "Create or Edit a Report" button from the ELECTrack Main Window and select the report that you want to work on (see section 3.1).
   b.   From the Report Entry window, click on the "Receipts" button.
   c.   First you must select either:
        ▪   Find/Add - allows you to enter new receipts
        ▪   Lump Sum - allows you to enter a lump sum contribution
        ▪   Edit - allows you to edit a receipt record that has already been entered (see section 3.8).
   d.   ELECTrack defaults to Find/Add, so if you are entering new receipts you can simply begin entering your receipt record.
   e.   When adding a new entry, you must begin to enter the contributor's information in the "Lookup Name" field. If you are entering an individual, start typing the last name and if you are entering an entity, start typing the beginning of the entity's name.
   f.   Once you have typed the first three letters ELECTrack will bring up the Search Lookup Table window where any matches will be displayed. If any of the contributors in the Search Lookup Table match the contributor that you entering, select it and then click on "Select" or press the enter key. The contributor's name, address and previous aggregate will be entered. You will then only need to enter the current transaction amount and select the form of the transaction (cash, check, charge, or other).
   g.   If, after typing the first three letters there are no matches, or none of the matches are the contributor you are entering, click on the "Add New" button. You will then be asked whether the contributor is an individual:
        ▪   If you answer yes, the data you entered in the Lookup Name field will be displayed in the Last Name field.   Then continue typing the contributor's name, address and other transaction information.
        ▪   If you answer no, you will be asked to select an organization type. This will allow ELECTrack to know how to classify the type of receipt that you are entering. Once you have made a selection, the data you entered in the Lookup Name field will be displayed

in the entity name field. Then continue typing the contributor's name, address, and other transaction information.

h. When entering a receipt transaction, you can indicate that the receipt was an in-kind contribution by clicking in the In-Kind Contribution box. This should be used whenever the contribution was something other than money.

i. If your campaign finance entity is a political action committee or a party central committee you have the option of indicating that the contribution was earmarked for administrative purposes.

j. If the contribution that you are entering was made by the purchase of a ticket (i.e. to a fundraising event), click on the Ticket box and then enter the amount that the tickets were sold for.

k. Once you have entered all of the receipt information, you can save the record by either clicking on the Save button or pressing the enter key. The transaction details that you entered (amount, date, form of payment) will remain. This information can be changed when you enter the next contributor.

l. If you want to report contributions as a lump sum amount, click on the "Lump Sum" button at the top of the receipt window. All of the name and address fields will be disabled, and you then need only enter the transaction details.

3.3   Entering Other Income
To enter interest, refunds, rebates, or other miscellaneous income do the following:

a. Click on the "Create or Edit a Report" button from the ELECTrack Main Window and select the report that you want to work on (see section 3.1).

b. From the Report Entry window, click on the "Other" button.

c. First you must select either:
- Find/Add - allows you to enter new receipts; or
- Edit - allows you to edit a receipt record that has already been entered (see section 3.8).

d. ELECTrack defaults to Find/Add, so if you are entering new receipts you can simply begin entering your receipt record.

e. When adding a new entry, you must begin to enter the name in the "Lookup Name" field. If you are entering an individual, start typing the last name and if you are entering an entity, start typing the beginning of the entity's name.

f. Once you have typed the first three letters ELECTrack will bring up the Search Lookup Table window where any matches will be displayed. If any of the names in the Search Lookup Table match the name that you entering, click on it and then click on "Select" or press enter. The name, address and previous aggregate will be entered. You will then only need to enter the current transaction amount.

g. If, after typing the first three letters there are no matches, or none of the matches is the entity you are entering, click on the "Add New" button. You will then be asked whether the entry is an individual:
- If you answer yes, the data you entered in the Lookup Name field will be displayed in the Last Name field. Then continue typing the name, address and other transaction information.
- If you answer no, you will be asked to select an organization type. Once you have made a selection, the data you entered in the Lookup Name field will be displayed in the entity name field. Then continue typing the name, address, and other transaction information.

3.4   Entering a Loan
To enter a loan do the following:

a. Click on the "Create or Edit a Report" button from the ELECTrack Main Window and select the report that you want to work on (see section 3.1).

b. From the Report Entry window, click on the "Loan" button.

c. First you must select either:
- Add - allows you to enter new loan; or
- Edit - allows you to edit a loan record that has already been entered (see section 3.8).

d. ELECTrack defaults to Update, so if you are entering a new loan you will need to click on Add before entering the information.

e. Once you click on Find/Add, you will be asked, "Was this transaction made by an individual?". Answer accordingly and then enter the name, address, and other transaction information.

f. If a loan is from someone other than the candidate, written consent must be issue when the loan is first created. Accordingly, when entering a new loan click the, "Written Consent Filed Herewith" button. If it is not a new loan, or if it is a candidate loan, click the, "Written Consent Previously Filed" button.

g. Interest on the loan must be accounted for in the "Interest Rate Charged" field . If the interest charged amount is less than prime rate amount (as entered by you), the "In-kind Interest Contribution Amount" field will become enabled and you will need to calculate and enter the in-kind interest amount. ELECTrack will automatically list the in-kind interest as an "in-kind contribution" on Schedule 1B of your report.

3.5   Entering a Bill
To enter an outstanding bill (such as an item received for which payment will not be made until a future reporting period) do the following:

a. Click on the "Create or Edit a Report" button from the ELECTrack Main Window and select the report that you want to work on (see section 3.1).

b. From the Report Entry window, click on the "Bill" button.

c. First you must select either:
   ▪ Add - allows you to enter new loan; or
   ▪ Edit - allows you to edit a receipt record that has already been entered (see section 3.8).

d. ELECTrack defaults to Update, so if you are entering a new bill you will need to click on Add before entering the information.

e. Once you click on Find/Add, you will be asked, "Was this transaction made by an individual?". Answer accordingly and then enter the name, address, and other transaction information.

3.6   Entering Expenditures
To enter an expenditure made by your campaign finance entity do the following:

a. Click on the "Create or Edit a Report" button from the ELECTrack Main Window and select the report that you want to work on (see section 3.1).

b. From the Report Entry window, click on the "Expenditure" button.

c. First you must select either:
   ▪ Find/Add – allows you to enter a new expenditure record;
   ▪ Loan - allows you to enter a loan repayment expenditure;
   ▪ Bill – allows you to enter a bill repayment expenditure;
   ▪ Edit - allows you to edit an expenditure record that has already been entered (see section 3.8).

d. ELECTrack defaults to Find/Add, so if you are entering a new record, simply begin entering your expenditure record.

e. When adding a new entry, you must begin to enter the payee's information in the "Lookup Name" field. If you are entering an individual, start typing the last name and if you are entering an entity, start typing the beginning of the entity's name.

f. Once you have typed the first three letters ELECTrack will bring up the Search Lookup Table window where any matches will be displayed. If any of the payees in the Search Lookup Table match the payee that you entering, select it and then click on "Select" or press the enter key. The payee's name and address will be entered. You will then only need to enter the current transaction amount and select the form of the transaction (check or other).

g. If, after typing the first three letters there are no matches, or none of the matches are the payee you are entering, click on the "Add New" button. You will then be asked whether the contributor is an individual:
   ▪ If you answer yes, the data you entered in the Lookup Name field will be displayed in the Last Name field. Then continue typing the payee's name, address and other transaction information.

> - If you answer no, the data you entered in the Lookup Name field will be displayed in the entity name field. Then continue typing the payee's name, address, and other transaction information.

h. If your campaign finance entity is a political action committee or a party central committee you have the option of indicating that the expenditure was for administrative purposes.

i. For each expenditure entered you must select the expenditure type that best describes the expenditure made. If the expenditure is for the purpose of returning a contribution to a contributor, select the expenditure type, "*Returned Contribution*".

j. If an authorized campaign worker makes an expenditure on behalf of the campaign finance entity, the individual may be reimbursed from campaign funds. To report this, enter the name of the person or entity who received a payment from the campaign worker. Then, in the reimbursement field, select from the drop down list the name of the campaign worker who was reimbursed for the payment. To add a campaign worker to the drop down list, do the following:

> - From the menu bar, click on maintenance and then select "expenditure" and then "update look up table".
> - In the look up table, enter the name of the campaign worker and then check, "*staff member for reimbursements*".
> - Save and close.

k. In order to enter an expenditure to pay a loan or bill you must first enter the loan or bill transaction (see sections 3.4 and 3.5 respectively). After this has been done, you can select either loan or bill at the top of the Expenditure Entry window (see step c). Once you make your selection, you will receive a listing of the loans or bills that have been entered. Select the one that you are making a payment on, and then enter the appropriate transaction information.

3.7 Summary Sheet

The majority of the Summary Sheet is automatically filled out by ELECTrack. However, you do need to enter certain information. To do so, follow the steps listed below:

a. Click on the "Create or Edit a Report" button from the ELECTrack Main Window and select the report that you want to work on (see section 3.1).

b. From the Report Entry window, click on the "Summary" button.

c. Enter the following information:

> - Whether the report is final and the campaign finance entity intends to close (if so check the "final" box in the upper right hand corner of the Summary Sheet window);
> - The name of the bank where you have your campaign checking account, account number, and the amount of money in the account as of the ending transaction date;
> - The name, account number and amount of money in any additional bank accounts; and
> - Your prior report cash balance (if it is different than what was carried forward).

d. Save your changes and exit when you are done.

3.8 Editing and Deleting Entries

Any receipt, expenditure, loan, or bill entry that you enter can be edited or deleted. To do so, go to the appropriate entry screen and click on the "Edit" button at the top of that window. Then, you will need to bring up the item that needs to be edited or deleted. You can bring up the record by either entering the item number in the item number field or clicking on the "Magnifying Glass" button next to the item number field. You can then search for the name of the entity you wish to edit or delete. (Note, when searching, either enter the entire name of the individual or entity you are searching for or enter part of the name and the wildcard character *****.) Once you have brought up the record either make the necessary changes and then click on the save button, or click on the delete button to delete the record completely.

3.9 Creating an Amendment

In order to create an amendment, the report must have already been created and exported (see Part 6). If the report has been exported and you want to amend it do the following:

a. Click on the "Create or Edit a Report" button from the ELECTrack Main Window and indicate which report you want to amend (see Section 3.1).

b. When you select the report you will get a message asking whether the report has been sent to the State Board of Elections.

- If you answer "yes", the amendment field will indicate the amendment number (i.e. if it is the first time amending the report, it will indicate "1"). Click on the Save button.
- If you answer "no", you will not be creating an amendment. You should only indicate "no" if you have exported the report but have not sent it to the State Board.

c. Make any changes or additions necessary to amend the report.
d. Once you are done, export the report (see Part 6). ELECTrack will generate both a Transmittal Sheet and an Amendment Description Form. Both of those document should be signed and sent to the State Board.

Note: We recommend you print a copy of the report before you amend it since ELECTrack does not save prior versions of reports.

Part 4. Printing or Viewing a Completed Report

To print or view the data that you have entered in the report format, click on the "View Completed Report" button on the ELECTrack Main Window. Enter the report year and report type that you want to view. Then select which form you want to view (or check the "All Report Forms" box). You can then either click on the "Print" button to produce a paper copy of the report or click on the "Print Preview" button to view the report.

Part 5. Contribution Receipts

Maryland law requires that receipts be issued for most contributions that you receive (see page 28 of the *Summary Guide to Maryland Candidacy and Campaign Finance Laws* for more information about receipt requirements). To produce receipts, click on the "Create Letters/ Receipts for Contributors" button on the ELECTrack Main Window. Enter the report year and report type (or you can check the "All Report Types" box) for which you want to create receipts. Then select one of the following options:

- Receipt Only – This option will print out one contribution receipt for each contributor entered on the selected report(s).
- Letter Only – This option will print out a letter for each contributor entered on the selected report(s). You must also select the letter that will be used. See Part 8 for instructions on how to create a letter.
- Receipt with Letter – This option will print out a receipt and a letter on the same page. You must also select the letter that will be used. See Part 8 for instructions on how to create a letter.
- Label – This option will print out labels (see section 11.3) for each of the contributors on the selected report(s).

After you make your selection click on the "Print" or "Print Preview" button. Once the printing is complete (or you close the view) ELECTrack will ask, "Did the Report/Labels Print Successfully?". If you answer yes, the contributors' records will be flagged and you will not be able to re-print their information.

Part 6. Exporting the Report for Filing

When you have completed preparing your report, the data that you have entered needs to be sent to the State Board of Elections. To do so, click on the "Export Report for Filing" button on the ELECTrack Main Window and the do the following:

a. Enter an Export Code. The export code can be anything you want, such as the current date or your initials.
b. Select one of the following methods of exporting:
- Disk – This method exports your report data to a 3.5" Floppy Diskette that you will then have to mail to the State Board. (Note that ELECTrack defaults to the A Drive, which on most computers is the correct designation for the 3.5" disk. If this is not correct for your computer, you can change the drive designation.)
- Internet/FTP – This method exports your report data directly to the State Board via the Internet. In order to use this method, you must have an Internet connection on your computer.
c. Enter the report year and type and tab or click in the Export Name field. ELECTrack will automatically generate the export name. Do not alter the export name. Click on the execute button.

d. If you are exporting on a diskette, you are done once you receive the "Export Process Complete" message and the Transmittal Sheet is generated. Mail the diskette (labeled with your account name, number and the report due date) and the signed transmittal sheet to the State Board of Elections.

e. If you are exporting via the Internet, a log in window will be displayed on which you will need to enter your account number and your password (the nine digit alpha-numeric code that was sent to you by the State Board). ELECTrack should automatically establish your Internet connection. If it does not, connect to the Internet manually and then go to ELECTrack and export the report. You are done once you receive the "Export Process Complete" message and the Transmittal Sheet is generated. Sign and then mail the Transmittal Sheet to the State Board of Elections.

Part 7. Reports

7.1   Contribution Reports

The Search Contribution feature in ELECTrack gives you the capability of creating reports based on the contributor data that you have entered. For example, you can create a report that lists all contributors who are business entities who contributed over $500 during March and April of 2001. You can also define the order by which the list is printed (i.e. by date, alphabetically by contributor name, or by contribution amount). The Search Contribution feature also allows you to merge the contributor names and addresses into a letter or create labels. Finally, the Search Contribution feature allows you to search for a particular contributor by entering part or all of the contributor's name. A total contribution amount will be displayed at the bottom of the report.

To use this feature, click on the "Search Contribution" button on the ELECTrack Main Window and then define the report criteria by filling out any of the fields. If you choose not to fill out any of the fields, your report will include all of the contributors in the database. After you have defined the search criteria, click on the Sort tab and select the desired sort order and how you want the selected data to be printed (labels, letter, and/or report). If you are creating letters, you will need to select the desired letter (see Part 8 for information on creating ad hoc letters). Click on either the "Print" or "Print Preview" buttons to view the report.

7.2 Expenditure Reports

The Search Expenditure feature in ELECTrack gives you the capability of creating reports based on the expenditure data that you have entered. For example, you can create a report that lists all expenditures made for a particular purpose (i.e. printing and campaign materials) or all expenditures by check numbered between a specified range. You can also define the order by which the list is printed (i.e. by date, alphabetically by payee name, by amount, or by check number). Finally, the Search Expenditure feature allows you to search for a particular payee by entering part or all of the payee's name. A total expenditure amount will be displayed at the bottom of the report.

To use this feature, click on the "Search Expenditure" button on the ELECTrack Main Window and then define the report criteria by filling out any of the fields. If you choose not to fill out any of the fields, your report will include all of the payees in the database. After you have defined the search criteria, click on the Sort tab and select the desired sort. Click on either the "Print" or "Print Preview" buttons to view the report.

7.3   Outstanding Obligations Reports

The Search Debt feature in ELECTrack gives you the capability of creating reports based on the outstanding obligations data that you have entered. For example, you can create a report that lists all loans, debt, or both made during a particular year or reporting period. You can also define the order by which the list is printed (i.e. by date, alphabetically by name, or by amount). Finally, the Search Debt feature allows you to search for a particular lender by entering part or all of the payee's name. A total outstanding obligation amount will be displayed at the bottom of the report.

To use this feature, click on the "Search Debt" button on the ELECTrack Main Window and then define the report criteria by filling out any of the fields. If you choose not to fill out any of the fields, your report will include all of the lenders in the database. After you have defined the search criteria, click on the Sort

tab and select the desired sort order. Click on either the "Print" or "Print Preview" buttons to view the report.

Part 8. Creating Ad-Hoc Letters
ELECTrack allows you to create ad-hoc letters that can be used with the Contribution Receipts (see Part 5) and the Contribution Search feature (see section 7.1). To set up an ad-hoc letter, click Tools on the Menu Bar and select "Create Ad-Hoc Letter". Then fill out the following fields:
- Letter Code – A short name or abbreviation for the letter you are creating (e.g. THANK1);
- Description – A short description of the letter (e.g. Thank you note to over $500 contributors);
- Salutation – The letter's greeting (e.g. Dear);
- Closing – The letter's closing (e.g. Sincerely);
- Sender – The name of the person sending the letter; and
- Free Text – The body of the letter.

After entering the above information click on the Save button located on the Tool Bar.   The letter will now be available in the "Letter" drop down list on the Search Contribution and Contribution Receipt windows. If you want to edit the letter, go back to the Create Ad-Hoc Letter window, select the letter code of the letter you want to edit, make the necessary changes, and then save.

Part 9. Look-Up Tables
9.1 Overview
Entry of receipts and expenditures starts with a look-up (see Sections 3.2 and 3.6) in order to determine whether the person has already been entered into ELECTrack. The look-up process reduces the amount of data entry and helps the user keep track of aggregate contribution amounts.

9.2 Creating Look-Up Tables
Generally the look-up tables are created automatically. Each new entry that you make is added to the look-up table. However, if you need to create (or re-create) either the contribution or expenditure look-up table, you can do so by clicking on "Maintenance" on the Menu Bar, then selecting "Contribution" or "Expenditure", and then selecting Build Look-up Table".

9.3 Removing Duplicates
If you have re-created your look-up table, or if you are concerned that you have not been consistent with your data entry you should do the following process:
- Select the "Maintenance" from the Menu Bar, then select "Contributions", then select "Remove Lookup Duplicates", and then select "By Name".
- This will give you matches where the name was the same but the address had differences. For example, if you have John Doe at 555 East *St.* and John Doe at 555 East *Street*, ELECTrack will treat them as separate records. Since both records pertain to the same person, you want only one look-up record with one aggregate amount.
- The record with the black arrow next to it is the record that will be stored in the look-up table. You can switch to any of the other listed records if they are correct. If none are exactly correct, you can edit any of the data fields in the center of the window. Once you have selected the correct record and made any necessary edits, click on the "Merge All Records" button.
- You can remove someone from the list of items to be merged if they don't belong (a second Frank Smith for example, who really lives at a different address). To do so, click on the Frank Smith that you want to remove and then click on the "Remove from Merge" button.*
- For contributions you need to do both the Name and Address merges to get the prior aggregate totals right in the records. Merges based on address matches will give you Frank J. Smith and Frank Smith and F. J. Smith all at the same address. They might also give you people you want to keep separate such as Frank's wife who gave as well.
- Combining Expenditure Look-ups will make your job a bit easier, but is less important since you do not have to keep aggregate-to-date information for payees.

9.4   Update Look-up Table
The update look-up table feature allows the user to edit look-up records, print or view a listing of look-up records, and delete look-up records.   Select the "Maintenance" from the Menu Bar, then select "Contributions" or "Expenditures", and then select "Update Look-up Table".

To locate a particular record, type the first three letters into the look-up name field and then select the appropriate record from the list. You can then edit the record and save it. Your change will only affect the look-up table. If you want the change to apply to campaign report data that has already been entered, you will have to edit that record as well (see Section 3.8). However, the next contribution or expenditure that is entered that relates to the edited record will contain the new information.

To delete a particular record, type the first three letters into the look-up name field and then select the appropriate record from the list. You can then click on the delete button to delete record from the look-up table. Remember, the record is only deleted from the look-up table (not from your campaign report data).

To print or view the look-up table, simply click on the "Print" or "Print Preview" button when the look-up window is blank. You can then indicate whether you want the list printed alphabetically or by address.

You can also update or edit a look-up table while you are entering a contribution or expenditure. For example, Bob Jones contributed to your campaign while living at address A. When he contributes again he is living at address B. When you enter the second contribution (see Section 3.2), select his name from the search look-up table list. The address A information will be displayed. Change the address to B and then enter the contribution information and save. The look-up table will now have Bob Jones at address B.

Part 10.   Database Management
10.1. Back-Up
All of the data that you enter into ELECTrack is saved in one database file. Whenever you close ELECTrack you will be asked whether you want to back-up the database. Answer yes and save a back-up of the database.   The default file location where ELECTrack saves the database is c:\program files\efs\. However, there is a file menu that you can use to change the file location. You will need to save the file to your hard drive.

We strongly recommend that you periodically save the back-up file onto an external source (i.e. a diskette).   To do this, use your file manager, either Windows Explorer or My Computer, to locate the saved back-up. Make a copy, and then paste the copy in the external source. If you are using a diskette, you may need to compress the file before copying and saving it to the diskette.

You do not have to wait until you close the program to do a back-up of the database. You can click tools on the Menu Bar and select "System Back-up".

10.2   Database Recovery
If your computer crashes, or you need to switch computers you can easily recover your back-up data. First, you will install ELECTrack. Upon installation ELECTrack will have a new, blank database. Click on Tools on the Menu Bar and then select "System Recover". A file menu will appear. Locate and select the back-up database file (it will have to be on system hard-drive). The back-up database will then replace the current blank database.

10.3 Managing Two Accounts
It is possible, although cumbersome, to maintain two campaign accounts on one computer. To do so, it is recommended that you do the following:
   a.   Create two sub-folders under c:\program files\efs
   b.   Assign the sub-folders the name of the committee or the entity number.
   c.   If this is the first time using ELECTrack, do a system back-up (see section 10.2) and save the blank database to one of the two sub-folders that you created. Repeat this step, but save to the other sub-folder.

    d. If you already are using ELECTrack for one account, you will need to contact SBE for a blank database for the other account.

    e. Once you have the databases saved to the sub-folders, you are ready to go. Whenever you begin working with ELECTrack, go to Tools and then system recovery and then select the database from the sub-folder that you want to work on. Then when you are done with that database, go to Tools and select system back-up and then save the database to the appropriate sub-folder.

Part 11. Miscellaneous

11.1   Exporting Data as Flat Files

ELECTrack allows you to export your data to a text file in a character separated format. Click on "Tools" from the Menu Bar and select "Export Contributions/Expenditures to Flat File". Two flat files are created in the EFS subdirectory (generally under the Program Files directory). They are named CONTRIBUTIONS.TXT and EXPENDITURES.TXT. They are delimited files with the ^ character as the delimiter. (^ is the shift of the 6 key.) This data can then be imported into other programs (i.e. MS Excel). The Help interface lists the record layout of the flat files. Click on the Help button or the "How Do I Use this Software" button on the main window, click on "Help Topics" and then search for the words "export flat". Under topics select "*Export Contributions/Expenditures to Flat Files*".

11.2   Labels

ELECTrack gives you the option of printing labels. The labels are formatted to print on *Avery Labels* 5962 (two columns, seven rows).

11.3 Searching Tips

There are several search functions in ELECTrack, including: item number search (see section 3.8), contributor search (see section 7.1), and expenditure search (see section 7.2). When searching, you will have to enter the entire name, spelled correctly in order for ELECTrack to find it. However, the wildcard search can be used in cases where you aren't sure of the entity's exact name. If, for example, you were unsure of the entity's name, you may type the first few letters followed by an asterisk *. ELECTrack would then provide all items that have the first few letters in the field requested, regardless of what followed the first few letters. For example:

- You are looking for "Acme Enterprises".
- You enter "*Acme"* in the entity name field. Nothing is found since there are no records containing just "Acme".
- But, if you enter "*Acme*"* ELECTrack will return "Acme Association", "Acme Enterprise", and "Acme Inc.". You can then select the appropriate record.